





Texas Skyward User Group Conference

ACA Processing

Sara Olson - Skyward



Preparing your 1094/1095s



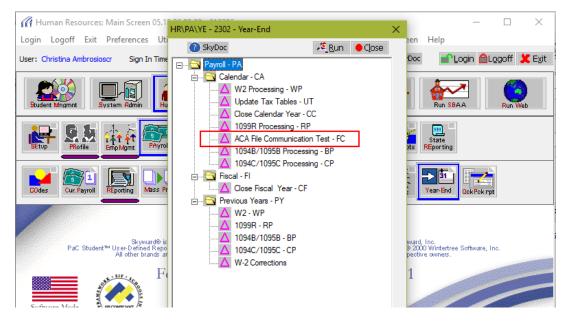
If this is the first year your district is submitting 1094/1095 information:

- Apply for your TCC code this must be a different TCC code than what is used when processing your W2s
 - Determine if your district will file 1094/1095B or 1094/1095C forms (or both)
- Once that has been received, submit a Communication Test File
- Once that has reached an "Accepted" status, contact the IRS and request to be moved to "Production" status
- Know if your district is self-insured and if so, review your employee data to verify that covered individuals can be found on the applicable employee profiles
- Review your employee information/ACA Tracker information to identify who needs to be reported and be provided a 1095 form

Getting Started



If this is the first time that your district is filing 1094/1095s on their own behalf, you will need to submit a Communication Test file



Communication Test File



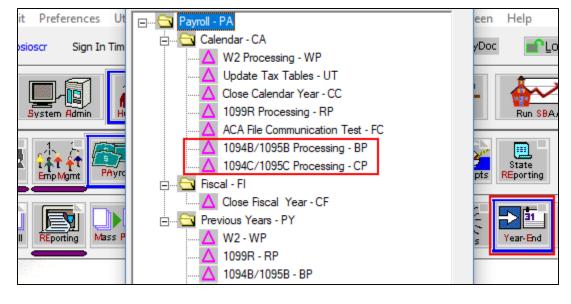
Once your test file has been accepted, you will need to contact the IRS to request your employer be moved to "Production" status (this will allow successful submissions of your live data files)

ACA File Communication Test Each employer is required by the IRS to submit a communications test file before submitting their actual 1095s. This utility will generate the necessary test files required to complete this certification. The files will be saved to the File Location you specify below. You must then upload the files to the IRS AIR site. Please refer to the IRS website for more detailed instructions on how and where this should be done. Note: The IRS requires employers to have a TCC specific to 1095s. Verify this code is accurate before clicking Run. File Location: TCC: Reporting Year: 2019 Select the Forms you chose when applying for your TCC: 1094/1095C 1094/1095B Both 1094C/1095C electronic files will be created in this folder	HR\PA\YE\PA\CA\F	C - 32811 - ACA File Communication Test	×
TCC: Reporting Year: 2019 Select the Forms you chose when applying for your TCC: 1094/1095C 1094/1095B Both	Each employer is re submitting their acti files required to con File Location you sp site. Please refer to where this should b Note: The IRS requ	quired by the IRS to submit a communications test file before ual 1095s. This utility will generate the necessary test inplete this certification. The files will be saved to the necify below. You must then upload the files to the IRS AIR to the IRS website for more detailed instructions on how and the done.	
Reporting Year: 2019 Select the Forms you chose when applying for your TCC: 1094/1095C 1094/1095B Both	File Location:		Browse
Select the Forms you chose when applying for your TCC: 1094/1095C 1094/1095B Both	TCC:		
	Reporting Year: .20	019	
1094C/1095C electronic files will be created in this folder	Select the Forms you	u chose when applying for your TCC: 1094/1095C 1094/1095C	95B OBoth
	1094C/1095C electro	onic files will be created in this folder	SkyDoc

Getting Started



Determine if your district is going to be processing 1094/1095C's or Bs (or both)



The workflow



Select the type of file you are going to be processing. The screen will show the Calendar Year, Transmission Number, Type and several Steps to follow

HR\PA\YE\PA\CA\CP - 328	312 - 1095C Processing		×
Welcome to the 1094C Transmission: 0001	/1095C Step by Step Pr Type: Original	ocess for Calendar Year 20	
Step 1 E		er Information for 1094C/1095Cs	
Step 2	Create/Modify/Re	eport 1095C Workfile	
Step 3	Create 1095C Print File	(used to print the 1095Cs)	
Step 3a	Prin	nt the 1095Cs	
Step 3b	(Optional) Submit Files f	for Skyward 1095C Printing Servi	ce
Step 4	Create Individu	ual 1095C PDF Files	
Step 4a	Post PDFs	to Employee Access	
Step 5	Create the Electro	nic 1094C/1095C Files	
Step 5a	Enter Receipt ID a	and Finalize this Transmission	
Use this option to create the	e 1094C/1095C Federal ele	ctronic files.	? SkyDoc #

Step 1 – Employer Information



This information must be populated before you can move on to additional steps. If this is not your first year processing 1094/1095s in Skyward, be sure to review the information for accuracy

sure to review the information for
accuracy

HR\PA\YE\PA\CA\CP - 3	2812 - Enter and/or Verify Employe	er Information	n for 1094/1095s	X
Employer Information	for 1094C/1095Cs for 2019			
Employer Information				√ OK
Name of Employer:	Skyward ISD			<u>¥</u> Cancel
Street Address:	8 Scramble avenue			<u>~Cancer</u>
Address 2:				
City:	Scramble		State: TX	
Zip Code	55555 J 0000 Country:	USA		
Phone:	(555) 319-7040			
EIN:	00-0002079			
TCC:	12345			
Contact Information				
First: Skyward		Middle:		
Last: Skyward		Suffix:		
Phone: (555) 319-7	7040			
What is this informati	on used for?			
	ormation that will print on the 1095C f			ns of the
			THE 1035C.	SluiDer
The OK button will verify t	he displayed data is correct and comp	nete.		SkyDoc

Step 1a – Allowing for Electronic Printing



Christina Ambrosioscr Account Preferences Exit ? Skyward School District If you would like to give your 1094C/1095C Processing (225) 🌅 📹 🏫 Favorites 🔻 👣 New Window 🖶 My Print Queu employees the ability to print their Allow Employees to Print 1095s Electronically Settings own 1095 forms via Employee Access, 1095 Processing Year: 2019 ▼ you can set up a "survey" to allow Back Allow employees to receive 1095s electronically 2 * Selection Parameters: Default Parameters them to make that selection. * Dates 1095 option visible for employees: 10/01/2019 to 12/31/2019 Report of Email employees once they confirm or deny they would like to receive their 1095s electronically. Electronic 1095 Responses Confirm Email Body: Thank you for choosing to print your 1095 form via Employee Access. You will be notified when your form is ready for viewing/printing. Deny Email Body: You have opted to receive your 1095 form in paper form from the district. The form will be mailed directly to your home address once they have been processed. Employee Notification Preview Notification [?] * Notification: Skyward School District provides employees the ability to print their own 1095 forms if they choose to do so. Please make a selection below to indicate your preference for how you will receive your 1095 form. All employees will be granted access to the form electronically; however, if you indicate here that you will print your own, the district will not provide you with a paper copy to be mailed to your home Allow Employees to Print 1095s Electronically Settings - HR\PA\YE\PA\CA\CP - 32812 - 05.19.06.00.05 - Google Chrome ▲ Not secure | pbroker1/scripts11/cgiip.exe/WService=30477web/epayrolledit019.w?h95ElectRegYear=2019&hWhereFi Options for Receiving my 2019 Form 1095 Skyward School District provides employees the ability to print their own 1095 forms if they choose to do so. Please make a selection below to indicate your preference for how you will receive your 1095 form. All employees will be granted access to the form electronically; however, if you indicate here that you will print your own, the district will not provide you with a paper copy to be mailed to your home. I do not need a printed copy of my 2019 Form 1095 from my employer. I will print my own Form 1095 from Employee Access. I want to receive a printed copy of my 2019 Form 1095 from my employer. Ask me again later.

Step 2 – Creating the work file

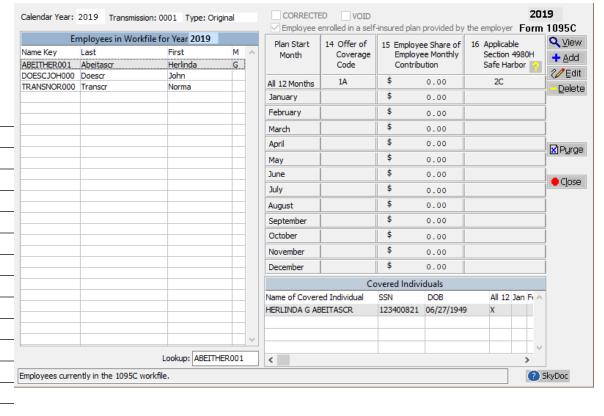


Create (or re-create) the work file. This 1095C Workfile for 2019 Transmission 0001 option builds your file to include the Employee Selection Methods (Mutiple methods can be used to select employees) ✓ QK Method 1: Select from Employee Profile Method 2: Select from Employee Management reportable employees who will receive Close Selection Parameters Last Used Parameters 1095 forms EM Plans Report Method 3: Select/Import Specific Employees-Select Employees who will not meet the other parameters or who have not been paid in the reporting year, but you still want a 1095 created for them. Selection Parameters Selected Employees Name Key Emp Type Method 4: Import from ACA Hours Tracker Full Time Calculation: Monthly Method Lookback Method Select ACA Hours Tracker Templates Description Created By Self-Insured Options Self-Insured Employees District Offered Self-Insured Coverage for the Months of: Emp Type / Name Key ☑JAN ☑FEB ☑MAR ☑APR ☑MAY ☑JUN Import ☑JUL ☑AUG ☑SEP ☑OCT ☑NOV ☑DEC ✓ Use Employee Selection Parameters: Selection Parameters Last Used Parameters Total Employee Count Parameters If Printing by Location use These parameters define how employees are counted for each month. The IRS control date indicates which day of Check Location the month to measure on. If the Control Date is between the Employee Start Date and termination date, then the Building employee is counted for that month. Recalculate Total Employee Count Calculations during the workfile creation. IRS Control Date: Termination Codes Employee Start Date: Start Date First day of each month Code Description O Hire Date O Last day of each month Rehire Date 12th day of each month Ourrent Pos Start Date Include blank reason codes as If blank use: permanent termination Start Date Hire Date

Step 2 – Reviewing/Modifying the work file



Create (or re-create) the work file. This option builds your file to include the reportable employees who will receive 1095 forms



Step 2 – Reports and other options



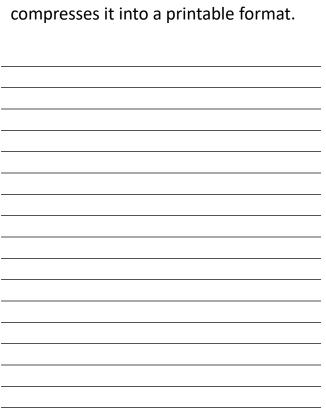
Review your exceptions, all employees including exceptions and re-calculate your employee counts if

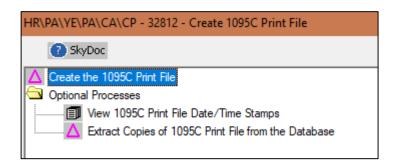
Δ	Recreate 1095C Workfile - Last created 09/21/2018 at 8:58 AM
	View the 1095C Workfile Creation Parameters
Δ	Modify Current 1095C Workfile
	Optional Reports
l !	Report 1095C Workfile - Exceptions Only
i	Report 1095C Workfile - All Employees
	1095C File Tracker
	Total Employee Counts

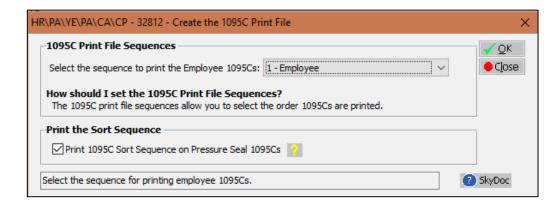
Step 3 – Creating your print file



Create your Print File which is going to be the first step in producing the PDF forms for your employees. This step takes the work file information and compresses it into a printable format.





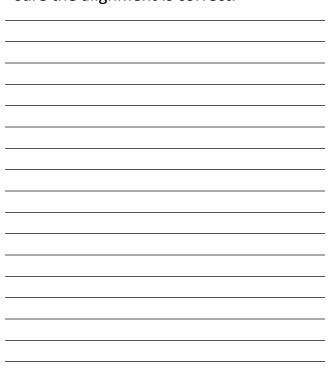


Step 3a – Printing the forms

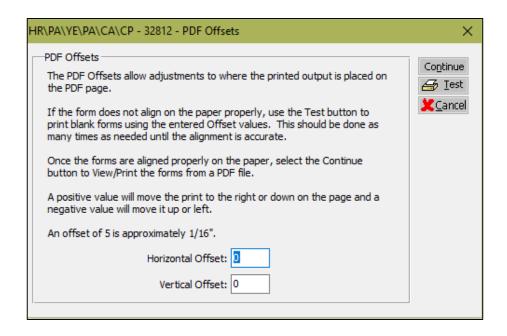


If you are printing your own forms, select the option that represents the size form you ordered.

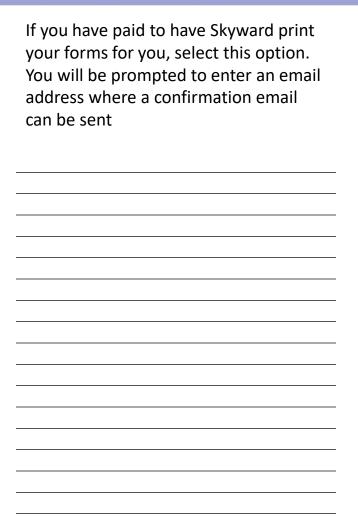
It is a good idea to do some test pages before printing the real forms to make sure the alignment is correct.







Step 3b – Let Skyward print the forms for you KYWARD

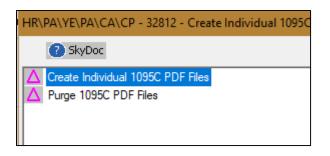


HR\PA\YE\PA\CA\CP - 32812 - Submit File for Skyward 1095C Printing Service	×
This process will automatically transfer your 1095C print file to Skyward for printing. A Skyward representative will send an email to the email address you enter below confirming Skyward has received your 1095C print file. If you submit your 1095C file to Skyward between 8:00 AM and 4:00 PM, you should receive a confirmation email within two hours. If you submit your 1095C file after 4:00 PM, you should receive a confirmation email before 9:00 AM the next business day.	<u>√ O</u> K <u>K C</u> ancel
If you do not receive a confirmation email from Skyward within the times specified above, please call Skyward support immediately and let them know you have submitted your 1095C file but have not yet received a confirmation email. If the file transfer fails, Skyward may not know you attempted to send the 1095C file so it is important that you call.	
Email Address: Scramble 1232@start.com	
The OK button accepts all entries.	DC #

Step 4 – Creating PDFs for Individuals



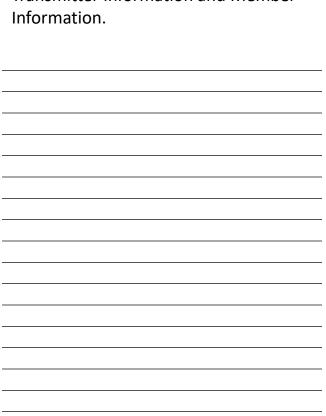
This option takes the information found on each individual's PDF form and pushes it out to Profile (and Employee Access if selected) for future viewing/accessibility

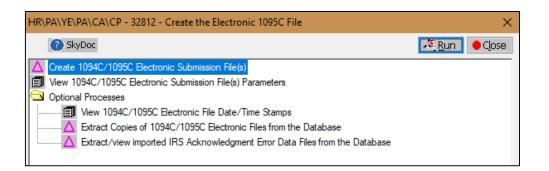


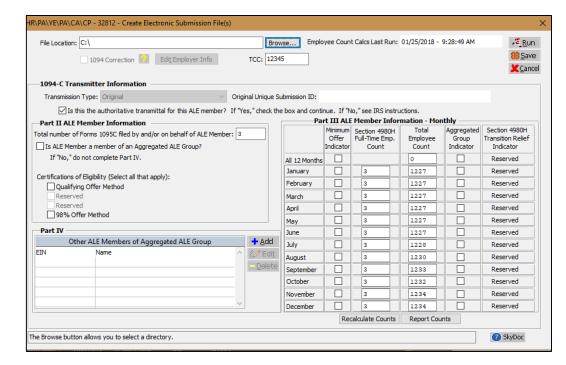
Step 5 – Creating Submission Files



When you are ready to create your 1094/1095 submission files, use this option. Review through the Transmitter Information and Member Information







Step 5a – Receipt IDs and Transmissions



After you have submitted your files to the IRS and they have been processed, you will receive a Receipt ID and Status. Select the provided Status and enter the Receipt ID here. If the file was not "Accepted", a new transmission will be created.

Н	R\PA\YE\PA\CA\CP - 32812 - Enter Receipt ID and Finalize this Transmission	×
	Transmission: 0001 Type: Original Locked	✓ <u>O</u> K X Cancel
	When the IRS successfully receives a transmission for processing, a unique Receipt ID is generated. If your transmission was successfully accepted without errors, enter the Receipt ID below to finalize the transmission. If your transmission was Accepted with Errors or Rejected, import the Acknowledgment file supplied by the IRS and the system will determine the next step.	
	☐ Transmission was Accepted by IRS - OR - ☐ Transmission was Accepted with Errors or Rejected (Import IRS Acknowledgement Error Data File)	
	Browse	
	Transmission Receipt ID:	
	IRS Transmission Status:	
	2	SkyDoc



End of presentation – Extra space for other notes







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THANK YOU FOR ATTENDING!

